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1.0 GENERAL

1.1 SUMMARY

The Office of Technology Services (OTech) offers email list management services to its Customers. LISTSERV, email list management software, supports all types of electronic lists including email newsletters, announcement lists, and discussion groups. Utilizing email lists advances the concept of email a step further by disseminating a single message simultaneously to a group of people and simplifies administration of the lists. Email list management services are offered on a per list basis. This service will provide list owners the ability to:

- Modify list subscriptions, signoffs, and settings
- Automate Subscription/Unsubscription Handling
- Automate bounced emails
- Assign an approver for distributed emails
- Distribute email to list subscribers
- Report on mailing list activity
- Control the behavior of lists
- Process message delivery errors
- Utilize template formatting: either through the web interface or through standard emails
- Maintain via web interface or command line through emails

1.2 REFERENCES

Items referenced here are support information indicated in this document:

	IDENTIFIER	DATE	TITLE
	00.00.001	2012	General Requirements
		2013	LISTSERV Submittal

1.3 SUBMITTALS

1.3.1 General

OTech is available to advise and assist customers in formulating IT designs that will leverage available service offerings. Contact your Account Manager to engage architectural/engineering and design consulting services. Additional charges may be incurred.

OTech requires the following method be used for work requests:

Item	Request Method
Quotes, Billable Service, List Removal (new or changes to existing services)	Customer Service System (CSS) Request

Modifications to Existing Systems	Service Desk or Remedy Service Request
Technical Problems, Troubleshooting	Service Desk or Remedy Incident
Security Related Issues/Incidents	Service Desk

Include the Customer's name, contact information and associated project name on forms, documents, and requests submitted to OTech.

1.4 Service Request Criteria

A completed LISTSERV Submittal is required for new email list management services prior to the start of work. To aid in the preparation of providing this technology, all information must be included in the Service Request. [Customer Service System \(CSS\)](#). Revised submittal(s) must indicate changes, if any.

1.5 EXPECTATIONS

1.5.1 Office of Technology Services

OTech manages contract and licensing for LISTSERV software and serves as liaison between the Customer and software manufacturer. OTech will maintain vendor support and update server software in accordance with manufacturer recommendations.

OTech is expected to initialize and support lists as well as assign list ownership and provide list owner training. Lists are implemented in accordance with OTech naming standards. Upon initial implementation, the OTech will provide List Owner procedures and training.

As needed, OTech will provide technical assistance and troubleshooting for LISTSERV software customers. Troubleshooting in accordance with standard email lists is included in the standard service; however, troubleshooting non-standard implementations may incur additional fees.

1.5.2 Customer

Individual list management must be administered by the Customer (i.e. List owner). The customer is expected to designate list owners that will then maintain their list(s) on a daily basis. List owners:

- Set and change the configuration of the list
- Add, delete, and modify subscriptions to the list
- Add, delete, and modify additional list owners or list senders
- Assist list subscribers and potential list subscribers
- Set policies, procedures related to the list, and send administrative messages to the list
- Run reports on list activity
- Moderate lists, if needed

Customers are expected to notify OTech Service Desk for list modifications requiring OTech assistance and to receive assistance with technical issues.

1.6 SCHEDULING

OTech's goal is to provide timely, comprehensive and economical technology service in a timely manner. Customers promote this goal by promptly providing information requested, and by keeping the OTech Account Manager / Project Manager informed of technology project status.

Subscription requests submitted correctly will typically be available 3 business days following SR processing time.

Billing will begin the first full month following list creation.

1.6.1 Maintenance & Change Management

Maintenance of hosting devices of the email list management software is performed during scheduled maintenance periods and follows the established OTech Change Management process and are subject to the Change Management Schedule.

1.7 DEFINITIONS

Term, phrase, abbreviation	Definition
Announcement List	An announcement list would be used to distribute a newsletter or other timely information where responses to the list are neither expected nor desired.
List Owners	List owners are the primary administrators of the list. Email addresses with "owner" privileges may change the configuration and templates associated with the list, add and delete subscriptions, and change settings on the subscriptions.
List Senders	List Senders are allowed to post messages to the list. List Senders do not have administrative permissions and cannot modify list settings. In addition, List Senders do not receive administrative email notifications.
List Subscribers	People who have requested and been granted permission to join a particular mailing list. List subscription is free and subscribers do not need to be OTech customers. The only requirement to subscribe to a list is a valid email address.

2.0 PRODUCTS

2.1 **MANUFACTURER**

L-Soft

LISTSERV

2.1.1 Unit Pricing

Subscriptions to this service are available and can be referenced in the [OTech Rate Schedule](#).

3.0 EXECUTION

3.1 SECURITY

List owners have the ability to modify list level security settings including audit logging, list confidentiality and list validation. For additional details or assistance regarding these settings, please contact your OTech Account Manager.

3.2 QUALITY ASSURANCE

OTech standard email list names will ensure that list names are unique. Standard list name format requires that 1. The Customer's agency/department acronym be used; and 2. Text following the "@" sign adhere to the predefined standard. Customers may identify the text following the acronym only. For example:

CTA_CALNET2@listserv.state.ca.gov or DMV_DRIVERS@listserv.state.ca.gov

3.2.1 Office of Technology Services Responsibilities

1. Contract management.
2. Engage manufacturer services as necessary for problem resolution involving the software.
3. Review submittal for completeness and approve prior to beginning work.
4. Notify Customer of submittal flaws, if any

3.2.2 Customer Responsibilities

1. Provide complete and timely submittals; refer to 1.3 – SUBMITTALS information
2. Set policies and procedures related to list(s)

3.3 SUPPORT AVAILABILITY

Core business hours for technical support are Monday through Friday 0800-1700.

State holidays and mandated schedule alterations are observed and may impact staff availability.

3.4 INSTALLATION

3.4.1 Office of Technology Services Responsibilities

1. Creation and/or deletion of list(s) in accordance with the 1.3 - SUBMITTALS
2. List owner training and assistance

3.4.2 Customer Responsibilities include but are not limited to

1. Establish one or more list owner(s) who can administer list level settings
2. Establish list senders, if needed
3. Notify OTech of list removals